

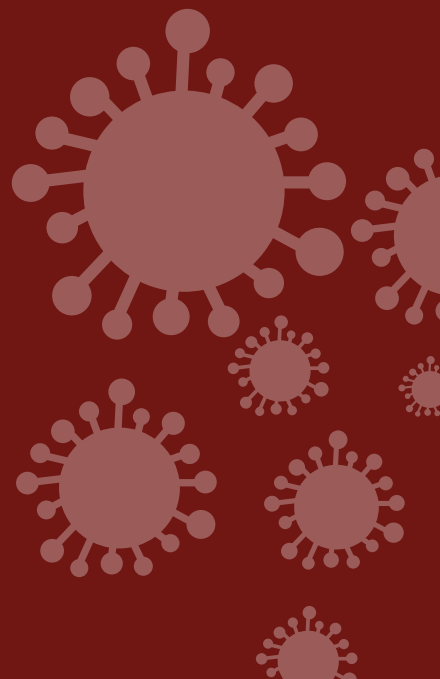


European Monitoring Centre
for Drugs and Drug Addiction



EU Drug Markets **Impact of COVID-19**

May 2020



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“ COVID-19 is an unparalleled public health emergency and one that has had ramifications across all areas of modern life. This report provides valuable insights into the short-term impact of the pandemic on the EU drug market and will help us prepare for longer-term repercussions. The economic effect of the crisis is likely to make some in our communities more vulnerable to both drug problems and drug market involvement. Furthermore, the growth of online dealing and encrypted communication will place greater strains on law enforcement. In the post-pandemic period, we are likely to see greater volatility, competition and violence associated with the drug trade. By anticipating these developments now, we will be better prepared to respond quickly and effectively to the new challenges we are likely to face.

Alexis Goosdeel
Director, EMCDDA

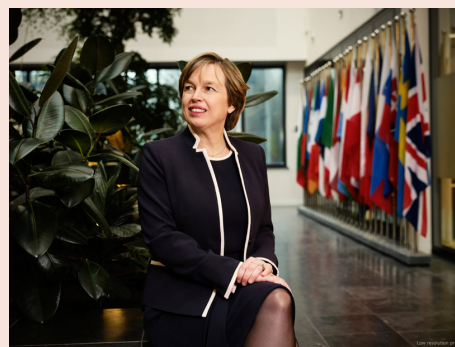
“ The pandemic has had a major impact on our lives and is slowing down our economy.

However, this economic trend has not been seen in international drug trafficking. These illegal markets continue to generate huge profits, including during the pandemic. Seizures of illegal drugs in some EU countries during the first half of 2020 have been higher than in the same months of previous years.

More than ever, these findings should motivate us to ensure that any recovery from the pandemic is accompanied by a strong and effective international law enforcement response.

We need to establish that drug traffickers do not benefit from the potential social and economic consequences of the current crisis.

Catherine De Bolle
Executive Director, Europol



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- Belgian Federal Police;
- Dutch National Police;
- German Bundeskriminalamt;
- University of Lausanne.

Finally, we would like to thank the experts who have kindly answered the questions of the authors and would like to acknowledge the many individuals and organisations whose research and analysis we have cited.

Introduction

The European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) and the European Union Agency for Law Enforcement Cooperation (Europol) published the most recent analysis of EU drug markets on 26 November 2019. At that time, no one could have predicted the dramatic changes that 2020 would bring. The COVID-19 ⁽¹⁾ pandemic has affected our daily lives in many ways and has also had an impact on drug markets. There is a critical need to investigate the extent and nature of this impact to identify areas where rapid adaptations to operational responses and future policies are required. In addition, lessons may be learned from the past and current situations in terms of how we might better anticipate emerging threats and ensure that we act quickly to meet immediate and longer-term data needs to inform policy, decision-making and operational responses.

The objective of this analysis of EU drug markets is to increase understanding of ongoing developments and their impact on the internal security and public health of the EU in order to inform European institutions and partners in EU Member States. This is of vital importance for formulating effective responses at EU and national levels and could inform (future) priorities for collaborative responses.

This report looks at the following areas to provide information on the current situation and an assessment of the medium-term outlook in relation to drug markets:

- impacts and consequences;
- drivers and facilitators;
- focus on the main drug types;
- criminal groups;
- law enforcement responses;
- outlook.

Methodology

This report uses a broad definition of the illicit drugs market, encompassing the illicit production, trafficking and wholesale distribution of substances and sale to the end-user.

The findings are based on data collected rapidly by the EMCDDA and Europol in the context of the COVID-19 pandemic. The EMCDDA conducted a targeted online survey — ‘EMCDDA: Impact of the COVID-19 pandemic on the drug market’ — in April 2020. The EMCDDA survey yielded 29 responses

from experts based in 22 EU Member States ⁽²⁾. Those who contributed were doing so not officially on behalf of their country but as members of various expert networks: the EMCDDA Scientific Committee ($n = 5$), the EMCDDA Reference Group on Drug Supply Indicators ($n = 9$), the European Network of Forensic Science Institutes ($n = 2$) and EMPACT ⁽³⁾ ($n = 10$). The responses to 17 questions were examined, by drug type where relevant, in five content-based categories: (i) production; (ii) trafficking and seizures; (iii) availability, prices and purities; (iv) source of supply; and (v) drug-related violence and criminality. The survey also contained a question about how the responses of law enforcement authorities are being affected by the COVID-19 pandemic. The survey was supplemented with a parallel data collection exercise among the EMCDDA national focal points in the EU Member States ($n = 24$), open source information, reports from independent experts, national and local studies and anecdotal evidence. Many respondents stated that it was too early to identify drug market changes due to the time lag involved in monitoring or other data accessibility issues. Clearly, a response of ‘no change’ may mean that changes are not yet apparent. Similarly, changes noted are informed opinions but a caveat here is there is an absence of quantitative data that allows the robust observation of changes occurring over a relatively short time period. Therefore, conclusions drawn here are necessarily preliminary and will require review as more data sources become available. Unless stated otherwise, where survey responses are summarised in this report, experts from countries that are not listed either did not reply or replied ‘don’t know’. In addition, replies from Ukraine and the United Kingdom have not been included in these analyses, as the replies were not submitted through official channels; however, they have been used to contextualise the analysis. When there was more than one contributor per country, the response that was deemed most relevant was used for the analysis.

Europol’s contribution to this joint report is primarily based on intelligence received from law enforcement authorities in the Member States and from law enforcement partners across the world. This includes operational information from live cases and investigations, as well as strategic intelligence received from law enforcement sources. Where necessary and appropriate, this information has been complemented with verified information from open sources.

In total, Europol received information from 26 EU Member States, the United Kingdom and 14 partner countries on the crime situation during the COVID-19 pandemic through weekly reporting and a questionnaire.

⁽¹⁾ COVID-19 is short for coronavirus disease 2019, a respiratory illness caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2).

⁽²⁾ Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Ireland, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Portugal, Romania, Slovakia, Spain, Sweden; as well as Norway, Ukraine and the United Kingdom.

⁽³⁾ The European Multidisciplinary Platform against Criminal Threats is a group coordinated by Europol that comprises experts from law enforcement agencies working in the drugs field.

Key findings

- ▶ Global restrictions on travel and other measures as a result of the COVID-19 pandemic have had a temporary disruptive impact on the drug market leading to shortages of and higher prices for some drugs, but the situation is subject to rapid change.
- ▶ The disruption to the supply chain and logistics of drug trafficking in Europe is most evident at the distribution level, because of social distancing measures.
- ▶ The movement of bulk quantities of drugs between EU Member States has continued despite the introduction of border controls due to the continued commercial transportation of goods throughout the EU.
- ▶ In relation to cocaine, in particular, there is little evidence of disruption to activity at the wholesale importation level; however, experts in some countries report increasing prices and decreasing purity at the consumer level, indicative of localised supply shortages.
- ▶ Organised crime groups (OCGs) remain resilient and are adapting their *modi operandi* to the current situation, further exploiting secure communication channels and adapting transportation models, trafficking routes and concealment methods.
- ▶ The current instability has led to an increasingly volatile environment for criminal businesses along the supply chain in Europe and appears to have resulted in increased levels of violence among mid-level suppliers and distributors.
- ▶ Surface web and darknet markets, social media and secure encrypted communication applications now appear to be playing a more prominent role in the sourcing of drugs at user level. Home deliveries, less face-to-face dealing and less reliance on cash as a form of payment seem to be increasing for individual transactions and it is possible that behavioural changes, once established, will persist over the longer term.
- ▶ Shortages of cannabis resin and possible stockpiling of herbal cannabis by users have led to inflated retail prices for both cannabis resin and herbal cannabis in some Member States. The domestic production of herbal cannabis appears not to have been significantly disrupted.
- ▶ Heroin trafficking seems to be continuing on many of the known routes. The availability of heroin has decreased in some areas but this varies depending on national confinement rules and restrictions on movement, with higher prices also reported in some places. Community-based information from drug workers also suggests that there have been some shortages and also the possibility that heroin has been substituted with other substances. These substances may include synthetic opioids (diverted medicines or new psychoactive substances (NPS)) or alternative drugs (e.g. crack cocaine, amphetamine, synthetic cathinones), and it is possible that some of these substances may feature more prominently in the drug market in the longer term in affected places.
- ▶ Cocaine trafficking using maritime shipping containers has continued at levels that are comparable to or even possibly higher than those seen in 2019. European and Colombian data show that significant seizures were made in the first part of 2020, despite the restrictions resulting from the COVID-19 pandemic. Unsurprisingly, trafficking by air passengers has decreased dramatically.
- ▶ Synthetic drug production continues in the main European producing zone in the Netherlands and Belgium, as evidenced by the number of illicit laboratories dismantled and dumpsites reported. However, in Europe and globally, the demand for synthetic drugs used in recreational settings, in particular MDMA, seems to have diminished in the short term due to the closure of venues and cancellation of festivals. The wholesale prices of amphetamine and MDMA have increased in several countries; however, the Netherlands reports decreasing prices, indicative of attempts to increase sales.

Impacts and drivers of drug markets

Key points

- Restriction measures have had a positive impact on low-level violent crime in general, however, drug-related violence is reported to be increasing in some EU countries and local conflicts over drug distribution and territory during the pandemic have also been noted.
- The logistics of drug trafficking appear to be most affected in relation to the movement of bulk quantities of drugs between EU Member States, due to the introduction of border controls.
- A number of trafficking, supply and distribution strategies have been adopted to overcome the restrictions implemented as a result of the COVID-19 pandemic.
- The data show an increase in the use of darknet markets as a potentially convenient channel for drug distribution, notably for small quantities of herbal cannabis.

sources of income through work or begging because of the COVID-19 restrictions.

Law enforcement authorities in Austria reported no change in the level of drug-related violence but noted that, in general, community harms have decreased as the majority of people, including drug users, are staying at home. Portugal also reported that the social distancing rules have led to a general decrease in levels of violent crime. General reporting to Europol also indicates that low-level violent crime has decreased in general but serious drug-related violence continues (Crimesite.nl, 2020; Slot, 2020) (see also section on criminal groups, p. 23).

It is probably too early to properly assess the levels of drug-related violence in many countries. The restrictions on movement and the increased presence of security forces on the streets seem to have had a positive effect on low-level violent crime. The lifting of the restrictions, however, is likely to see a return of drug-related violence. Different cities or neighbourhoods are likely to experience different patterns of drug-related violence after the pandemic, and longer-term measurements are needed to understand these patterns. The expected economic downturn is likely to have a significant negative impact on dependent drug users, which may lead to increased levels of acquisitive crime until the situation stabilises.

Impacts and consequences

Harms to individuals, families and neighbourhoods

Localised shortages of some drugs have led to increased tensions between the OCGs supplying these drugs. In some cases, this has resulted in an increase in the number of violent confrontations reported between OCG members ⁽⁴⁾.

Experts from Denmark, Finland, France and Sweden replying to the EMCDDA survey reported an increase in the number of violent confrontations, while Austria and Portugal reported a decrease. In Denmark, COVID-19 restrictions have had an impact on the sale of cannabis in a certain part of Copenhagen, which has led to displacement of the trade to surrounding areas and increased feelings of insecurity in those communities. Although Denmark reported an increase in violent conflict between criminal groups, it was also stated that this is not unusual in the criminal milieu, so it may not be related to the impact of the COVID-19 pandemic on drug markets. The Danish and the United Kingdom expert mentioned that there have been some early indications of low-level acquisitive crime, tentatively linked to dependent drug users who have lost alternative

Impact on the legal economy

The current pandemic and its economic consequences are likely to exert significant pressure on the financial system and the banking sector. Anti-money laundering regulators and other professionals in the sector should anticipate attempts by OCGs to exploit the volatile economic situation to launder money using the onshore financial system.

The current crisis and its impact on the economy may provide a real test of the effectiveness and resilience of the EU-wide measures introduced to limit cash transactions and prevent money laundering schemes.

The expected emergence of a post-pandemic recession may lead to a reduction in the prices of goods and a downturn in economic sectors favoured by criminals. This may be particularly noticeable in the real estate sector, which lends itself to the investment of criminal profits. The real estate and construction sectors will become even more attractive for money laundering, both in terms of investment and as a justification for the movement of funds. In addition, criminals will continue to abuse financial markets in order to layer and integrate criminal

⁽⁴⁾ Contribution provided to Europol.

proceeds. Investment in artworks may also be attractive due to the absence of fixed prices.

Economic hardship also lowers the barriers for some people to accept off-the-book transactions and engage in other illegal conduct, especially when criminal investors are the only accessible providers of capital. Criminal activity may also appear to be a viable option for income generation for those whose livelihoods have been affected by the pandemic. Negative coping mechanisms, such as engaging in cannabis cultivation or gang affiliation, may become more common.

Cash-intensive businesses such as restaurants, casinos and beauty salons have long been used to launder illicit profits, by integrating illegal gains with legitimate revenue; however, the reduction in opportunities to use physical cash may affect the cash flow related to drug trafficking and dealing. With the diminishing relevance of cash as a payment medium during the crisis and the closure of these types of businesses, it is unclear what other forms of money laundering will be employed in the future.

Overall, the economic impact of the pandemic will be a key factor in shaping the future landscape of serious and organised crime in the EU. It should be noted, however, that the economic impacts of the pandemic and the activities of those seeking to exploit them may become apparent only in the mid-term and will probably only manifest themselves much later.

Drug supply in prisons

In order to prevent the spread of COVID-19 in prisons, changes to prison rules have been made in some countries, such as restrictions on visits and other outside contacts (Council of Europe, 2020). This has indirectly led to a decrease in the availability of drugs in some prisons and this has sparked violent reactions from some prison inmates in France, Italy, Spain and the United Kingdom (Séré, 2020; Floris, 2020; López-Fonseca, 2020; Sundstrom and Blackmore, 2020). Under these more restrictive conditions, new methods to smuggle drugs into prisons may appear; for example, the use of drones is expected to increase, as a recent incident near the perimeter of a prison in the United Kingdom suggests (Lancashire Police, 2020).

Drivers and facilitators

Trafficking, supply and distribution

Much like legitimate businesses, OCGs have been affected by the COVID-19 pandemic. Many rely on global supply chains to help them produce, transport and sell illicit goods and the current situation has, in some cases, forced them to adjust their business models (World Customs Organization, 2020).

However, it should be noted that the transportation of commercial goods has not seen the same widespread disruption as individual passenger transport. Therefore, the trafficking of drugs by maritime shipping or commercial air freight has probably continued at similar levels to those in the pre-pandemic period.

Seizure data collected from some of the main entry points of cocaine to the EU suggest that there has been little or no disruption to the supply of cocaine to the EU during the pandemic (see Table 1).

Maritime trafficking

Maritime shipping has continued relatively unimpeded by the pandemic and trafficking opportunities remain available to OCGs involved in the wholesale transportation of drugs to Europe. A number of significant seizures of drugs have been made in the last few months. For example, at the end of March, Dutch law enforcement authorities seized 2 000 kg of cocaine at the Port of Rotterdam ⁽⁵⁾ (Pieters, 2020). At the beginning of May, 500 kg of cocaine was seized from a ship under the flag of Montenegro, sailing from Brazil via the United Kingdom to the Port of Hamburg in Germany ⁽⁶⁾ (Hakirevic, 2020). Heroin, cannabis resin and further cocaine seizures have also been made and are detailed later in this report.

The continuing maritime trafficking activity is also revealed by the steady number of seizures of cocaine, destined for Europe, at Colombian ports (Table 1). From 1 January to mid-May 2020, there were 10 seizures of cocaine at Colombia ports, half of which was destined for Belgium, amounting to 1 138 kg of cocaine (73 % of the total).

⁽⁵⁾ Contribution to Europol from the Netherlands.

⁽⁶⁾ Contribution to Europol from Germany.

TABLE 1
Cocaine destined for Europe seized in Colombian ports,
1 January to 16 May 2020

Port of departure	Destination	Quantity (kg)
Santa Marta	Hamburg, Germany	62
	Antwerp, Belgium	475
Cartagena	Leixões, Portugal	9
	Rotterdam, Netherlands	20
	Antwerp, Belgium	363
Barranquilla	Sweden (*)	322
Urabá	Antwerp, Belgium	300
Total		1 551

(*) Port not specified.

Source: Colombian National Police contribution to Europol.

Aviation trafficking

The COVID-19 crisis has resulted in unprecedented disruption to global air passenger transport — virtually all airports, especially those handling international passengers, have faced sharp declines in traffic volumes, limiting the opportunities for drug smuggling by air passengers. During repatriation efforts early in the crisis, three suspects were arrested in Costa Rica prior

to boarding a flight destined for Switzerland for attempting to smuggle cocaine to Europe (20min.ch, 2020).

It should be noted that, despite the sharp reduction in passenger numbers, many airports, and certainly large airports serving major cities, remain open for cargo operations (Gittens, 2020). Drug trafficking by air freight appears to be continuing.

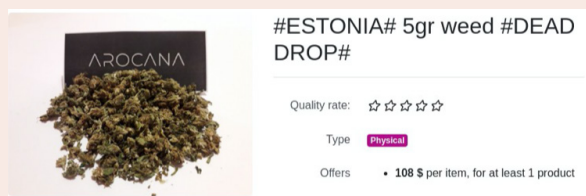
Intra-EU trafficking

OCGs are quick to adapt and exploit new opportunities, circumvent controls and use the newest digital technology. Street dealing in some cities has been severely affected during the COVID-19 pandemic due to restrictions on movement and the increased presence of law enforcement authorities; however, this may have been mitigated by a shift to online channels and delivery service models.

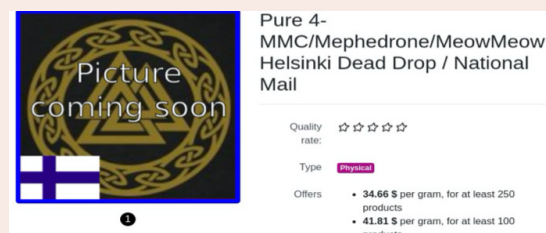
Some Member States have reported that drug trafficking has continued as normal, mainly because the cross-border passage of licit goods has been maintained and the transportation of commercial goods has continued, therefore allowing the flow of illicit drugs to continue. Meanwhile, the travel restrictions and additional controls imposed on citizens at many EU borders have led to diminished intra-European trafficking using couriers.

Drug drops, aka 'dead drops'

This distribution method involves the buyer transferring funds to the seller, after which the drugs are secreted in a hidden place and the coordinates and a description of the hiding place are sent to the buyer to retrieve them. Frequently, cryptocurrencies and encrypted communication channels are used, such as Telegram, Wickr, Signal, etc. Clearly, the seller and the buyer need to be relatively close to each other, as they both have to travel to the same place.



This method has been used to distribute drugs for a long time in Russia and Eastern European countries, such as Moldova and Ukraine. It has also been reported in some EU Member States, such as Estonia, and more recently in Belgium and the United Kingdom, linked to lockdown conditions, although the method is likely to be more widespread. For example, some vendors on darknet markets have recently offered dead drops in Barcelona, Helsinki and Tallinn.



Monitoring the darknet

Systematic monitoring of and research into drug-related activity on darknet markets provides an opportunity to understand the changing scope and nature of the wider drugs phenomenon during the COVID-19 pandemic.

A number of research groups across the EU and beyond (*) collect and analyse data from these platforms. Generally, the analytical focus remains on a single country. A wide range of units of analysis can be applied, including listings (sales offers), sales (or reviews as a proxy for sales) and vendors, potentially limiting the comparability of individual study findings.

(*) For example, the German Bundeskriminalamt (J. A., personal communication, 13 May 2020) and the University of Lausanne, Switzerland (Q. R., personal communication, 13 May 2020).

Darknet market analysis and findings reported by the EMCDDA (May 2020) focus on the EU, thereby complementing individual/national research efforts, and rely on 'web crawlers' that systematically gather and process information from darknet markets. Data are collected from major darknet markets and currently include buyers' feedback reports as a proxy for sales activity, quantity and price.

The COVID-19 pandemic has highlighted an opportunity for more joint research activities in this area by EU agencies, national authorities and academia.

Distribution

Increasingly, drug distributors appear to have adapted their *modi operandi* to fit with the COVID-19 regime, for example impersonating particular professions in order to move around at specific times of the day. Several reports have revealed how criminals have used falsified certificates, commercial vehicles and corporate vests to impersonate food delivery workers or other key workers in order to deliver drugs (Pattison and O'Brien, 2020).

It seems, then, that home delivery is being used more regularly than before. Interpol issued an alert in April 2020 warning that criminal organisations are using food delivery services to transport drugs and other illicit goods, such as cocaine, marijuana, ketamine and ecstasy (Europol, 2020a; Interpol, 2020). This *modus operandi* was probably in use prior to the pandemic but is more apparent now.

In order to avoid contact between buyers and sellers, the 'dead drop' technique, borrowed from espionage tradecraft, also appears to have gained in popularity as a method of drug distribution during the COVID-19 pandemic (see box, 'Drug drops, aka "dead drops"').

Post parcels

Drug distribution using post and parcel services has continued during this period and was noted to be increasing in some EU countries. Some opportunistic concealment methods have also been used; for example, the increasing demand for supplies such as gloves, masks and hand sanitiser products has been exploited by criminals, who hope that border controls for these types of goods may be less rigorous. In one such case in April 2020, 14 kg of cocaine was found concealed in a delivery of face masks during border checks in the United Kingdom (National Crime Agency, 2020).

Technology: the darknet, social media and secure communication apps

There are reports that an increasing number of consumers may have turned to online methods to source drugs rather than buying from street dealers to cope with restrictions introduced by governments.

A mixed picture has emerged regarding the observed changes to how drugs are being sourced. In Austria, Belgium, Bulgaria, Croatia, Finland, France, the Netherlands and Spain the use of mobile apps has been reported; in Bulgaria, Croatia, Czechia,

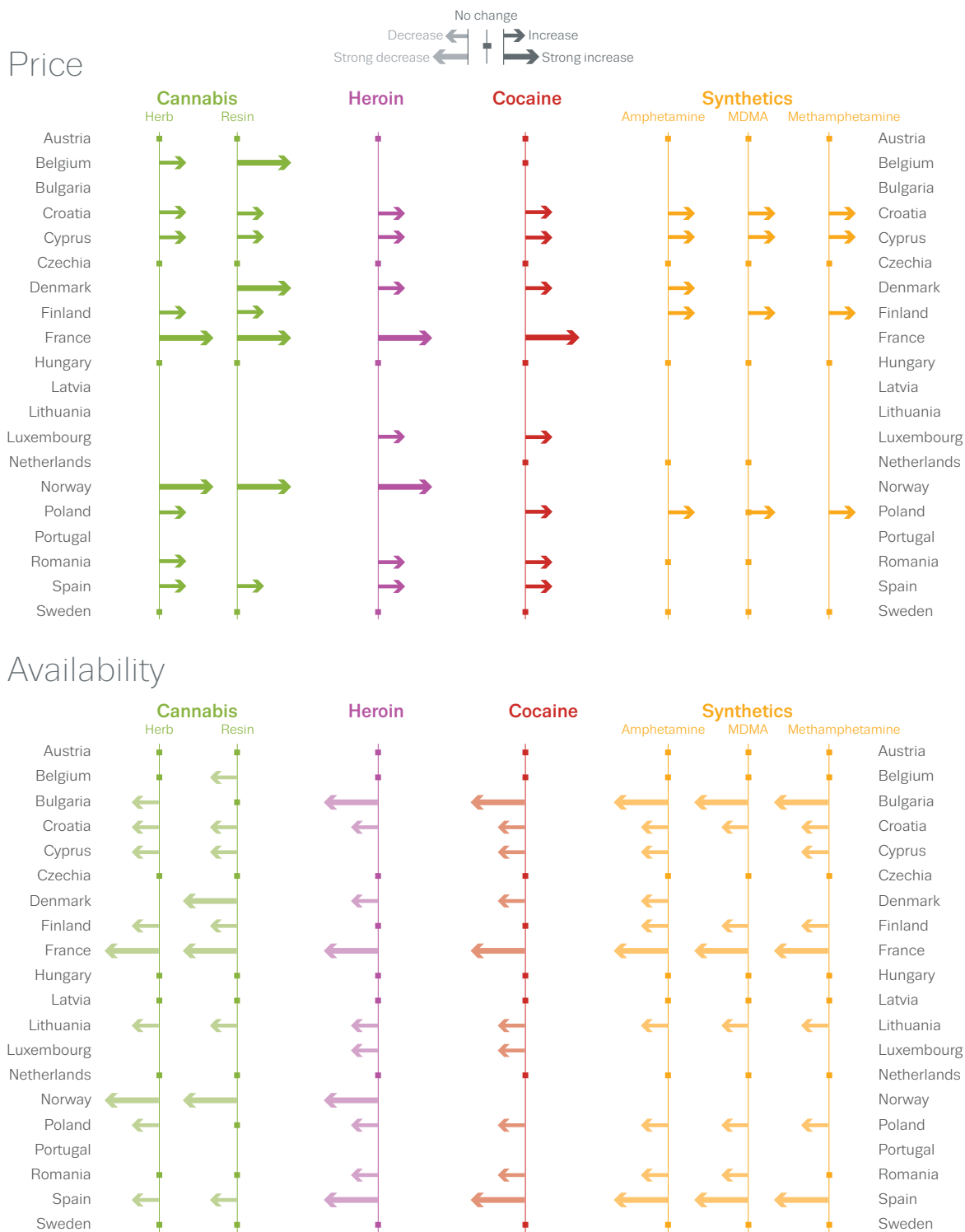
Finland and the Netherlands the use of the darknet markets has been noted; and in Bulgaria, Croatia and the Netherlands the use of the surface web has been reported.

A preliminary analysis of a darknet cannabis market has provided evidence of increased sales activity (EMCDDA, 2020; Groshkova et al., 2020). In the first 3 months of 2020, online cannabis sales increased by 27 %. The revenue generated over this period fell by 17 %, suggesting a shift towards an increased number of sales of smaller quantities and a decreased proportion of larger quantity sales. This is unlikely to have been a supply issue, as prices remained static for the lower quantity sales and were reduced for the larger quantity sales. This could

indicate that those purchasing from online markets for re-sale restricted their activity, anticipating limited opportunities for physical distribution. The increase in smaller sales suggests that either existing cannabis buyers were stocking up or new recruits were moving to online markets to mitigate potential physical supply problems. This distinction is an important one, as a long-term impact of the current crisis could be that more cannabis users become familiar with this way of accessing these products. There appears to have been an increase in the use of encrypted communication too, posing difficulties for continuous monitoring (EMCDDA, 2020).

Changes in drug price and availability

Expert opinion: drug retail prices and availability at consumer level



Source: Responses to EMCDDA expert opinion survey conducted between 7 and 27 April 2020.

Cannabis

Key points

- Domestic production of herbal cannabis does not appear to have been disrupted by the COVID-19 pandemic, in respect by cultivation sites that were already established before restrictions were imposed.
- Increases in the retail prices of herbal cannabis in some Member States imply that there have been supply shortages during the pandemic, likely linked to distribution issues.
- Stockpiling of herbal cannabis by users may have led to small price increases at wholesale and/or retail market levels.
- Production of herbal cannabis in the Western Balkans is expected to increase due to shifting law enforcement priorities towards restriction compliance.
- Law enforcement action in Morocco and Spain has led to a reduction in the availability of cannabis resin in some parts of Europe, although this change was under way before the pandemic.
- Once in the EU, cannabis resin is mainly distributed by land and so the closing of internal borders has affected the availability of cannabis resin in some locations, leading to a marked increase in prices of cannabis resin and the emergence of new maritime trafficking routes.

Demand

The market for cannabis products is the largest drug market worldwide, including in the EU (EMCDDA and Europol, 2019). This report considers the two main illicit cannabis products used in Europe: herbal cannabis and cannabis resin.

Demand for cannabis products does not seem to have changed significantly. There was an initial peak in demand related to a number of users stockpiling cannabis products before the COVID-19 restriction measures took effect (EMCDDA, 2020; Gérome and Gandilhon, 2020), but there is currently no evidence to suggest significant changes since then. Little information is available on the impact on patterns of use, but a small-scale research study among cannabis users by the Trimbos Institute in the Netherlands showed that 2 out of 5 cannabis users have started to use more. Boredom seems to be the biggest cause of the extra use, followed by stress. A small number of users also reported starting to use less (Dutch Police, 2020a).

Herbal cannabis

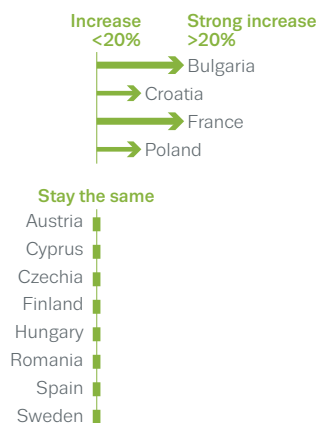
There appears to have been no immediate effect of the COVID-19 pandemic on the domestic production of herbal cannabis, as reported by experts from 14 EU countries responding to the EMCDDA survey (Austria, Belgium, Croatia, Cyprus, Czechia, Denmark, Finland, France, Hungary, Latvia, Lithuania, Netherlands, Romania, Sweden). Only Bulgaria reported a decrease in production. Possible explanations for the apparent lack of effect are the continuation of well-established criminal mechanisms and cultivation sites. For example, seizures of plant cuttings trafficked between the Netherlands and Belgium have continued, despite the restrictions. It is possible that a shortage of or a lack of access to fertilisers may impact the quality of the cannabis produced (Dutch Police, 2020a).

Although domestic production appears to be continuing, 14 experts reported a decrease in availability and an increase in prices of herbal cannabis at retail and/or wholesale levels of the market (see Figures 1 and 2). The reduced availability may be a temporary effect possibly resulting from disruption to drug markets due to social distancing, the stockpiling cannabis, or the closure of borders, restricting trafficking between countries. In Albania, which is a producer of herbal cannabis for the European market (EMCDDA and Europol, 2019), the cultivation of herbal cannabis is expected to increase as law enforcement resources are diverted to enforce compliance with COVID-19 restriction measures (Djordjević, 2020). Some trafficking routes from the Western Balkans to the rest of the region and the EU are still in use, based on recent large seizures of herbal cannabis in Montenegro, North Macedonia and Serbia (Ministry of Interior of Montenegro, 2020; Ministry of Interior of North Macedonia, 2020; Customs Administration from the Republic of Serbia, 2020). In addition, in early May, a one metric tonne seizure of herbal cannabis was reported near the Albanian-Greek border (Halili, 2020).

While domestic production of herbal cannabis in the EU seems to be quite stable, there are other signs that shortages may be affecting some markets. Samples sold as herbal cannabis were analysed by a Swiss drug checking service and were found to contain the synthetic cannabinoids 5F-MDMB-PICA and THJ-018 (rave it safe.ch, 2020a,b), rather than the expected tetrahydrocannabinol (THC). The composition of cannabis on the market needs to be monitored closely, as synthetic cannabinoids present a significant risk to those consuming them and a wider public health threat.

FIGURE 1
Expert opinion: changes in wholesale price per kg of herbal cannabis during the COVID-19 pandemic

Cannabis (herb)



Source: Responses to EMCDDA expert opinion survey conducted between 7 and 27 April 2020.

Cannabis resin

The main source of cannabis resin used in Europe is Morocco (EMCDDA and Europol, 2019). Several weeks before the COVID-19 restriction measures came into effect, there were reports of disruptions to the supply of Moroccan resin to Europe, related to law enforcement pressure on producers in Morocco and towards traffickers in the Strait of Gibraltar and the Mediterranean Basin (*Diario de Ibiza*, 2020). This is reported to have already caused some cannabis resin shortages in the north of Europe (Alaoul and Alexander, 2020; Fischer, 2020). Between the first week of March and the first week of May 2020, Moroccan law enforcement units seized over 15 tonnes of cannabis resin in Morocco during several targeted police operations (Kasraoui, 2020a,b,c; *North Africa Post*, 2020; Yabiladi, 2020). In addition, Lebanese authorities made the largest cannabis resin seizure in their history in mid-March 2020, totalling 25 tonnes. The shipment was destined for an African country, possibly in transit to the European market (Naharnet, 2020).

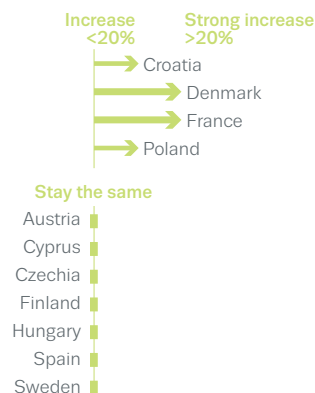
COVID-19 restrictions appear to have exacerbated the difficulties of trafficking cannabis resin to European consumer markets. The shipping lines between Morocco and Spain have

been suspended since mid-March (Gérome and Gandilhon, 2020) and the border between Spain and France has been closed to normal traffic and put under high levels of surveillance, significantly affecting the traditional trafficking route. However, criminal groups have already adapted their methods to overcome the difficulties of transporting cannabis resin via the road network. At the end of March 2020, two major seizures (total 500 kg) from shipping containers were made in the Port of Antwerp in Belgium. Further, 11.5 tonnes of resin was seized from a shipment of potatoes imported from Morocco that arrived in Brussels via the Port of Antwerp in May 2020 (Belga, 2020).

The disruptions to the cannabis resin supply chain appear have led to a more pronounced reduction in availability (compared with herbal cannabis) and therefore a slight increase in retail and/or wholesale prices was reported by some experts responding to the EMCDDA survey (see page 13 and Figure 2). Some experts reported price increases of more than 20 % due to the reduction in availability of cannabis resin and the possible anticipation of a more risky operating environment under the COVID-19 restrictions (see page 13 and Figure 1).

FIGURE 2
Expert opinion: changes in wholesale price per kg of cannabis (resin) during the COVID-19 pandemic

Cannabis (resin)



Source: Responses to EMCDDA expert opinion survey conducted between 7 and 27 April 2020.

Heroin

Key points

- Heroin production appears to have been unaffected by the COVID-19 pandemic to date, but this is not surprising given the timing of the opium poppy harvest.
- Trafficking continues on many of the main trafficking routes, although some *modi operandi* are preferred over others due to restrictions implemented in response to the pandemic.
- Expert opinions suggest some disruption to heroin market at the consumer level in some countries, with higher prices also reported in some places, but this varies depending on national confinement rules and restrictions on movement.

Demand

Heroin users account for the majority of opioid users in the EU, comprising almost 80 % of the approximately 1.3 million high-risk opioid users (EMCDDA, 2019). Most heroin users are dependent on the drug and therefore it is reasonable to assume that demand has remained stable, in spite of the COVID-19 pandemic. On the other hand, the availability and accessibility of heroin at retail level may have been disrupted in some regions of the EU. It is too early to assess this but it can be expected that some heroin users may turn to other drugs, such as synthetic opioids (diverted medicines or NPS) or alternative drugs (e.g. crack cocaine, amphetamine, synthetic cathinones, etc.) in times of shortage.

Production

Most of the heroin consumed in Europe comes from opium poppies grown in Afghanistan and processed into heroin in the region. In April 2020, there were no indications that heroin production had been impacted by the COVID-19 pandemic or by the measures taken to limit its spread. However, the opium poppy harvest usually takes place between May and June and therefore it is possible that changes in heroin production may become apparent only after the harvest period ends. Recent reports suggest that opium harvesting is currently unaffected by the pandemic; however, the intensive manual workforce needed may be disrupted by the physical effects of the virus and the restrictions imposed on the movement of citizens. Additionally, the closure of borders could lead to shortages of acetic anhydride, the main heroin precursor, which may have a knock-on effect on the production of heroin (or its price) (Mansfield, 2020; UNODC, 2020).

Trafficking

When asked in the EMCDDA survey about changes in the number of seizures of heroin coming from outside the EU during the pandemic, experts from 9 countries noted no changes (Belgium, Czechia, Denmark, Finland, Hungary, Latvia, Poland, Romania, Sweden) and six (Austria, Bulgaria, Croatia, France, Portugal, Spain) reported a decrease in the number of heroin importations.

In terms of the volumes of single heroin shipments imported to the EU, six countries (Belgium, Czechia, Finland, Hungary, Latvia, Sweden) reported no changes, while Austria and Bulgaria noted a decrease.

It is important to note that Bulgaria, one of the main entry points for heroin in the EU on the Balkan route, reported that the number of seizures and the size of individual shipments have decreased during the reporting period. The reasons for this are unclear, but the COVID-19 pandemic is probably an influential factor, as OCGs may be experiencing difficulties in transporting the drugs. The de-prioritisation of drug law enforcement may be a factor. An impact on heroin trafficking was also noted in other countries (Austria, Croatia, France, Portugal, Spain), where either the number of seizures or the volume of heroin in single shipments has decreased during this period.

The trafficking of heroin has continued during the pandemic despite the various mitigation measures put into place by countries along the main trafficking routes. The transportation of commercial goods, which are often used as cover loads, has continued. Significant seizures of heroin have been reported along the Balkan route during this period, despite the COVID-19 pandemic. For example, a joint operation between Turkish and Bulgarian authorities led to the seizure of 72 kg of heroin in Bulgaria at the end of March 2020 (SELEC, 2020). In addition, several large heroin seizures have been reported in Turkey in the first months of this year, and a further two seizures of more than 100 kg each in eastern Turkey in late April 2020 suggest that the flow from Afghanistan to Turkey continues (Harmanci, 2020; Hazar and Varol, 2020). In addition, a Turkish and Dutch police joint operation at the end of February 2020 led to several important heroin seizures totalling 2 384 kg across five countries (1 105 kg in Kazakhstan, 703 kg in Germany, 350 kg in Poland, 171 kg in the Netherlands and 55 kg in Turkey) (*Daily Sabah*, 2020).

Meanwhile, on the Northern route and the Caucasus route, heroin trafficking also seems to be unaffected, although it is too soon to assess the intensity of the smuggling activity taking place. At the end of April 2020, for example, a seizure of 40 kg of heroin led to the arrest of two Bulgarian citizens, who allegedly

transported the drugs by car from Armenia to Georgia, with the purpose of transporting them on to Europe (US Embassy Tbilisi, 2020).

There is a lack of information regarding the impact of the pandemic on heroin trafficking along the Southern route. Nevertheless, it is fair to assume that, due to travel restrictions, heroin trafficking by air couriers has been heavily curtailed. While the number of heroin seizures from maritime shipping containers is small, the volumes seized in single shipments are generally large, so it is difficult to assess the impact on this modus operandi at this stage. A recent heroin seizure in the Port of Rotterdam, however, indicates that the maritime route has been active during the pandemic (Dutch Police, 2020a).

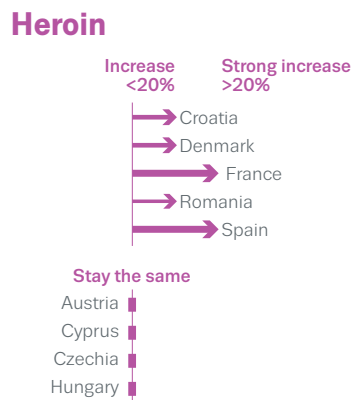
Two heroin seizures from trucks in the Port of Dover in the United Kingdom (15 kg smuggled by a Polish national and 3 kg of heroin (and 82 kg of cocaine) smuggled by a Slovenian national coming from Italy) suggest that, although trafficking by passenger transport is currently limited, smuggling by commercial road transport continues (Harper, 2020; Jackson, 2020).

Availability

When asked about changes in the heroin market as a result of the introduction of COVID-19 restriction measures, experts responding to the EMCDDA survey from five countries reported a decrease in availability, while experts from six countries reported an increase in price at the wholesale (per kg) level (see Figure 3). Furthermore, experts from Austria, Bulgaria, Denmark and Spain noted a decrease in the purity of heroin at the wholesale level.

FIGURE 3

Expert opinion: changes in wholesale price per kg of heroin during the COVID-19 pandemic



Source: Responses to EMCDDA expert opinion survey conducted between 7 and 27 April 2020.

With regard to the retail price of heroin, experts from eight countries reported an increase (see page 13). A decrease in purity at the retail level was reported by Austria, Bulgaria, Croatia, Denmark and Luxembourg whereas no changes in purity were noted by Czechia, Hungary, Portugal, Romania and Sweden.

Expert opinions on the wholesale and retail price and purity suggest that some heroin markets within the EU have been affected to some degree by the COVID measures. Important increases in the price of heroin at the wholesale level in two of the main heroin consumer markets (France, Spain), without reports yet of significant changes in price/purity at the retail level, suggest that, these price rises have not yet had an impact at the retail level.

Cocaine

Key points

- Trafficking of cocaine using maritime shipping containers appears to be unaffected, as suggested by the frequent seizures of large shipments at key European ports.
- Trafficking of cocaine by air passengers has dramatically decreased due to travel restrictions.
- Experts in some countries have noted an increase in price and a decrease in purity of cocaine at the consumer level, indicating that there may be some localised supply issues.
- Trafficking by post and parcel services may be increasing, in part because of trade on darknet markets.

Demand

Cocaine is used mostly in recreational settings and if the restrictions that have led to the closure of pubs, clubs, discos and other similar venues continue there may be a decrease in demand for this drug. The economic impact experienced by some users may also decrease the demand for this drug; however, data sources are not sufficiently developed to allow assessment of demand at present.

Production

Currently, there is a lack of information about how the measures introduced to combat the spread of coronavirus have affected the production of cocaine in South America. It has been reported that the price of coca leaves in Peru has dropped by a staggering 70 % (Stargardter and Jorgic, 2020). The reasons for this are unclear, but border closures and movement restrictions complicate the transportation of leaves to cocaine production

sites, which may have impacted on sales volumes and consequently on price. Any disruption to cocaine production will however take some time to become apparent in Europe.

The pandemic does not appear to have reached its peak in the main cocaine-producing regions and regions encompassing the maritime embarkation points in South America. Law enforcement authorities in these regions face intensified public order and quarantine duties, reducing the available capacities to engage in countering drug-related crime. There is a risk that this may lead to a decrease in checks at departure points and result in an increased flow of cocaine to Europe's key entry points in the next few months.

Trafficking

The information available suggests that wholesale cocaine trafficking, which was already at historically high levels in Europe, has not been significantly affected by the COVID-19 pandemic. When asked about changes in the number of cocaine seizures coming to Europe, experts responding to the EMCDDA survey from 10 countries reported no changes (Belgium, Czechia, Denmark, Finland, Hungary, Latvia, Netherlands, Poland, Romania, Sweden). Another six experts (Austria, Bulgaria, France, Croatia, Portugal, Spain) reported fewer cocaine seizures during this period overall.

In terms of the size of individual cocaine shipments imported to the EU, experts from seven countries (Austria, Belgium, Czechia, Finland, Hungary, Latvia, Sweden) reported no changes. Between the completion of the EMCDDA survey and the time of writing, several more large seizures have been made in some countries, including Belgium (see Table 2 and Figure 4).

The Netherlands, Belgium and Spain are the main entry points and distribution hubs for cocaine in the EU (EMCDDA and Europol, 2019). The measures taken to prevent the spread of COVID-19 have had very little short-term effects on cocaine

TABLE 2

Amount of cocaine (tonnes) seized in selected Member States, 2017 to end of March 2020

	2017 (whole year)	2018 (whole year)	2019 (whole year)	2020 (Jan-end March)
Belgium	44.6	52.8	63.7	18
France	17.5	16.4	9	4
Germany	8.2	5.6	10	2.7

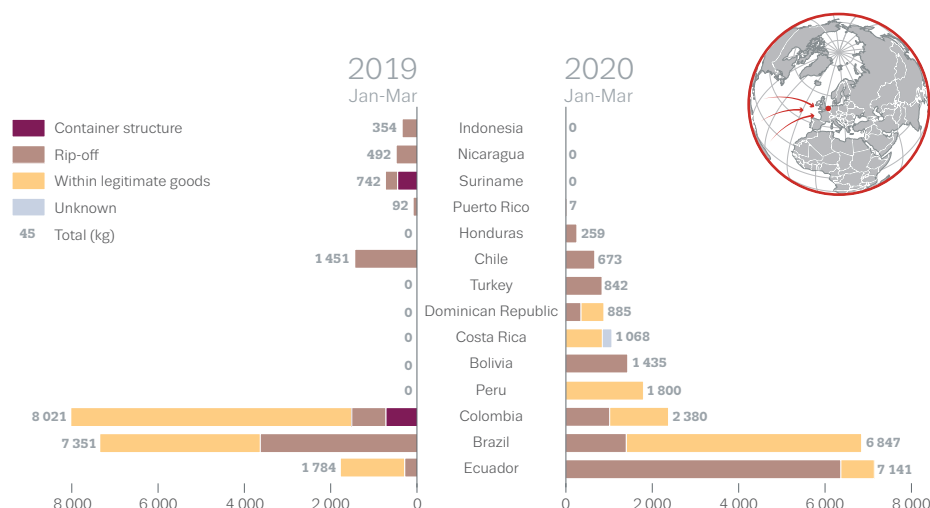
Source: contributions to Europol by Belgium, France and Germany. Seizure data were contributed to Europol by Member State law enforcement authorities. The most recent data may be amended at a later stage due to differing reporting mechanisms at national level.

FIGURE 4

Cocaine seized in containers in or bound for Antwerp by modus operandi: January to March 2019 and January to March 2020 (kg)

Cocaine targeting Antwerp

The main route to smuggle cocaine into Europe is still the maritime route with the port of Antwerp remaining a key entry point.



Source: Belgian Federal Police.

trafficking to Europe. This could be because it usually takes 4-8 weeks for ships to reach European ports from South America. Therefore, cocaine seized in Europe from maritime shipping containers until the end of April 2020 probably departed South America before any restrictions were imposed. On the other hand, the number of seizures of small quantities of cocaine has decreased in some EU Member States, probably due to the air passenger travel ban and road transport restrictions imposed in most EU countries to combat the spread of COVID-19. For example, the cocaine trafficking route from French Guyana to continental France is temporarily inactive for this reason (Gandilhon, 2020).

Detailed supplemental information from Belgium, France and the Netherlands confirms that cocaine trafficking towards Europe does not appear to have been disrupted. A comparison of the amount of cocaine seized in Belgium in the first quarters of 2020 and 2019 shows an increase of 6 tonnes in 2020 over 2019 (18 tonnes vs 12 tonnes⁽⁷⁾).

In the Netherlands, cocaine trafficking in the Port of Rotterdam also appears to be continuing according to the Dutch authorities (Dutch Police, 2020a). Seizure data from the Port of Rotterdam for the first 3 months of 2020 show a higher number of seizures than in the same period in 2019. Further individual cocaine seizures in April of some 4 tonnes off the coast of Galicia, Spain, 4.5 tonnes in the Netherlands and 4 tonnes in Belgium confirm

that bulk trafficking activity persists (Lefelon, 2020; Policía Nacional, 2020; Van Wely, 2020).

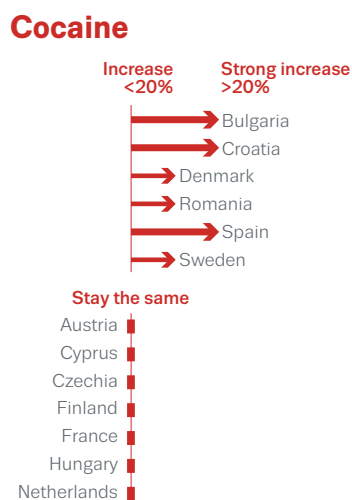
Regarding price, six experts responding to the EMCDDA survey reported that the wholesale (per kg) price of cocaine has increased and another seven experts reported no change (see Figure 5). Experts from Bulgaria, Denmark and Spain reported a decrease in the wholesale purity of cocaine.

Very few EMCDDA survey respondents reported information about the wholesale (and indeed retail) price and purity of crack cocaine and hence there were too few data for analysis at this time.

As mentioned previously, cocaine trafficking towards the main entry points and distribution hubs in the EU appears to be largely unaffected at this stage of the pandemic. From these locations, cocaine would normally be distributed to other parts of Europe, mostly by road, although, increasingly, post and parcel services may be used to rapidly move small consignments. The restriction of private passenger circulation in many EU countries has limited the opportunities to transport drugs from the main entry hubs towards the consumer markets, although goods continue to flow. However, the analysis of wholesale price and purity levels suggests that, within Europe, cocaine accessibility and availability have been affected in some countries.

(7) Contribution by Belgian law enforcement authorities to Europol.

FIGURE 5
Expert opinion: changes in wholesale price per kg of cocaine during the COVID-19 pandemic



Source: Responses to EMCDDA expert opinion survey conducted between 7 and 27 April 2020.

OCGs have adapted quickly to the new situation and are exploiting opportunities that this exceptional situation has brought. Some new *modi operandi* have already been reported, such as the concealment of contraband shipments in medical equipment and products used to combat the pandemic.

In terms of the retail cocaine market, a few experts have noted an increase in price, a decrease in availability (see page 13) and a decrease in purity.

The impact of restrictions appears to be more noticeable at the retail level than at the wholesale level. Although large quantities of cocaine are available in Europe, the logistics of transporting smaller batches, including retail quantities, are more difficult to orchestrate in light of the travel restrictions. Nevertheless, new *modi operandi* observed in some EU Member States confirm that OCGs are quickly adapting to new situations and challenges. Seizures of drugs from people disguised as key workers have been widely reported (Daly, 2020).

Amphetamine, MDMA and methamphetamine

Key points

- Globally, the demand for synthetic drugs used in recreational settings has significantly diminished because of the closure of clubs and similar venues and the cancellation of music festivals, leading to a decline in orders for synthetic drugs produced in Europe.
- Production sites in the main European synthetic drug production hub in the Netherlands and Belgium are still operational. Processes may change if drug precursors (usually shipped from China) become scarce and producers are in need of alternative chemicals or sources.
- The wholesale prices of amphetamine and MDMA have increased in several countries; however, the Netherlands, a major producer, has reported decreasing prices.

Demand and availability

Europe is an important producer of amphetamine, MDMA and methamphetamine for consumption in Europe and also for the export market. The production of synthetic drugs is dependent on the availability of the drug precursors and other chemicals used to make them. The Netherlands and Belgium are well known production locations for amphetamine and MDMA. The Netherlands and, to a lesser extent, Belgium are also emerging as production centres with a significant output of methamphetamine, intended for trafficking to destinations outside the EU, such as Japan and Australia. Czechia has historically been, and still is, a centre for the manufacture of methamphetamine in Europe (EMCDDA and Europol, 2019).

It appears that in many countries, and indeed globally, the demand for synthetic drugs used in recreational settings has significantly diminished because of the closure of clubs and venues and the cancellation of events such as music festivals. Consequently, orders for synthetic drugs from producers in the Netherlands are reported to have declined and, according to the Dutch respondent to the EMCDDA survey, the wholesale prices of Dutch amphetamine and MDMA have decreased markedly (by more than 20 %).

When asked about the availability of synthetic drugs, none of the respondents to the EMCDDA survey reported an increase for any of the three main synthetic drugs, with most reporting that changes were not yet apparent (see page 13).

Perhaps linked to availability issues, some experts reported reduced purity levels of amphetamine and methamphetamine; however, no change has been noted in the MDMA content of ecstasy tablets.

Production

Drug precursors and the chemicals used to make them are shipped to Europe mainly from China. Disruption to the production of these raw materials in China, or shipping interruptions that would affect their availability in Europe, do not seem to have affected European production, perhaps because of the presence of stockpiles of drug precursors in key producing countries. Dutch producers, in general, start a production cycle only after an order has been placed and therefore drug precursors may still be available because the number of orders has reduced (Dutch Police, 2020a).

To date, the production of synthetic drugs in the Netherlands and Belgium appears to be unaffected by the COVID-19 restrictions (see Table 3). For example, on 27 March 2020, Dutch police dismantled a synthetic drug laboratory with equipment capable of producing up to 5 000 ecstasy tablets per hour (Seunis, 2020). Dutch police also reported that the number of dumping incidents has not changed compared with the same period last year. In Czechia, it was reported that a lack of precursors for the production of methamphetamine has led to an increase in the price and a reduction in the quality of methamphetamine in some places. Bulgaria reported a decrease in synthetic drug production combined with a decrease in the availability of drug precursors. Any shortages of precursors may prompt producers to use alternative substances, which may result in unexpected drug products that may present additional risks to consumers. Dutch police have increased their

TABLE 3
Number of synthetic drug laboratories dismantled in Belgium and the Netherlands, 2019 and 2020 (to end of March)

	2019 (whole year)	2020 (to end of March)
Belgium	19	8
Netherlands	90	33

Source: Contributions to Europol by Belgium and the Netherlands.

vigilance towards companies with legal stocks of chemicals that can be used in the manufacture of synthetic drugs in case producers target these stocks (Dutch Police, 2020b).

To date, the production of synthetic drugs in the Netherlands and Belgium appears to be unaffected by the COVID-19 restrictions (see Table 3). For example, on 27 March 2020, Dutch police dismantled a synthetic drug laboratory with equipment capable of producing up to 5 000 ecstasy tablets per hour (Seunis, 2020). Dutch police also reported that the number of dumping incidents has not changed compared with the same period last year. In Czechia, it was reported that a lack of precursors for the production of methamphetamine has led to an increase in the price and a reduction in the quality of methamphetamine in some places. Bulgaria reported a decrease in synthetic drug production combined with a decrease in the availability of drug precursors. Any shortages of precursors may prompt producers to use alternative substances, which may result in unexpected drug products that may present additional risks to consumers. Dutch police have increased their vigilance towards companies with legal stocks of chemicals that can be used in the manufacture of synthetic drugs in case producers target these stocks (Dutch Police, 2020b).

Trafficking

As already noted, intra-European trafficking has become more complicated during the COVID-19 pandemic due to transport restrictions and the re-introduction of internal border controls.

As an important area for synthetic drug activity, the closure of the Dutch border with Belgium has important implications for drug trafficking. The Netherlands reported that some old smuggling routes between the two countries have re-emerged (Dutch Police, 2020a).

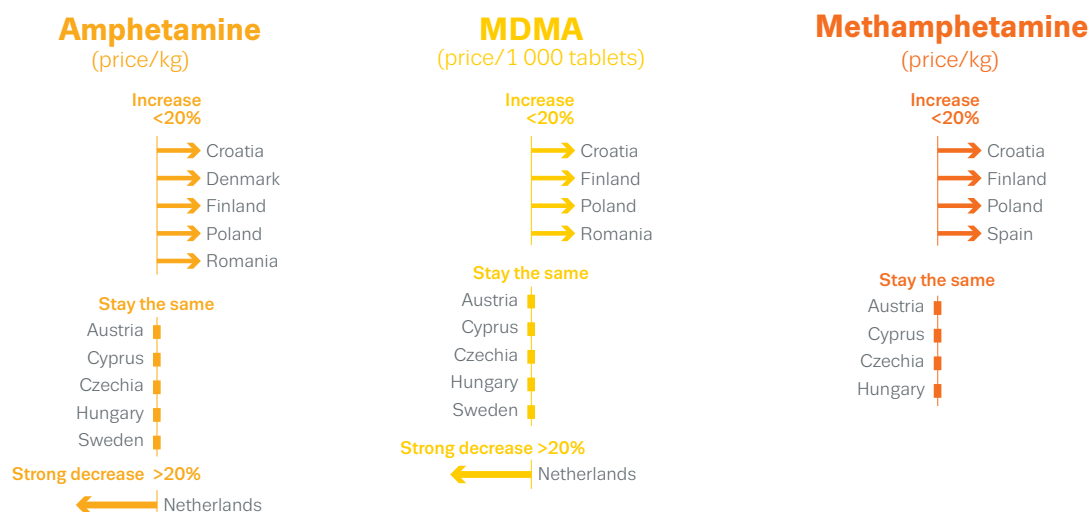
It is clear that MDMA continues to be exported from Europe using post and parcel services, probably related to darknet market sales. For example, on 8 April 2020, 10 000 MDMA tablets sent from Germany were seized at an international mail facility in the United States (US Customs and Border Protection, 2020). In addition, synthetic drugs produced in Europe continue to be shipped in large quantities by maritime transport to other continents, as demonstrated by seizures of MDMA in Colombia and South Africa in May 2020 (El Universal, 2020; South African Police Service, 2020).

Supply and distribution

The wholesale price of drugs can be an indicator (when taken together with purity) of drug market conditions. While most experts responding to the EMCDDA survey indicated that it was too early to make any assessment of wholesale prices, some experts noted no change in the wholesale (per kg) price of amphetamine or increases (less than 20 %), and purity was either stable or decreasing in these countries. Interestingly, the Netherlands was the only country that reported a price decrease (see Figure 6).

FIGURE 6

Expert opinion: changes in wholesale price of synthetic drugs during the COVID-19 pandemic



Source: Responses to EMCDDA expert opinion survey conducted between 7 and 27 April 2020.

A similar pattern emerged for MDMA. Experts from five countries noted no change in the wholesale price of MDMA and experts from four countries noted an increase (less than 20 %) (per 1 000 tablets). The Netherlands was the only country to indicate a price decrease (see Figure 6). Any changes in the amount of MDMA in ecstasy tablets or in the purity of MDMA have not yet been observed in the data currently available, such as recent results from a drug checking service in Switzerland (raveitsafe.ch, 2020a,b).

In the case of methamphetamine, four experts responding to the EMCDDA survey noted stable wholesale (per kg) prices and four noted an increase (less than 20 %). No experts reported a decrease in the wholesale price of methamphetamine and the respondent from the Netherlands indicated that there were no known changes at present (see Figure 6).

Most experts were unable to provide information on the prices paid by consumers at this time, with some reporting no changes in price. Experts from four countries indicated that the

retail price had increased slightly for all three drugs. Denmark reported that the amphetamine retail price had increased (see page 13).

New psychoactive substances (NPS)

A rapid analysis of the data reported to the EU Early Warning System covering the first 4 months of 2020 shows that more than 150 case reports of NPS were submitted, representing a slight increase over the same period in 2019. However, most of the case reports related to detections of NPS that occurred in 2019, with only 16 (approximately 10 %) relating to 2020. With such a small data set, it is not possible to assess how the NPS market has been impacted during the COVID-19 pandemic.

Criminal groups

Drug trafficking remains the largest criminal market in the EU. In terms of structures, all types of OCGs are active in drugs trafficking, from hierarchical organisations to loose networks, as well as clan- or ethnicity-based criminal organisations.

Cooperation among suspects involved in drugs trafficking is highly networked and relies on brokers to mediate and establish contacts between OCGs specialising in different tasks such as production, transport and logistics, extraction from the harbour, wholesale trading and retail distribution. A large number of OCGs appear to be dedicated to delivering these specific types of criminal services to other OCGs in exchange for a percentage of the anticipated profits.

These collaborative arrangements are highly dynamic and partnerships often last only for a short period of time. Brokers and OCGs often collaborate for individual deals or operations and do not maintain long-term partnerships. Because of these unstable relationships, OCGs and brokers are constantly trying to identify new potential partners. Brokers also play a key role in bringing suspects into contact, in mediation and in arranging contract killings. Brokers originating from the EU are present in

source and production regions to arrange large-scale cocaine shipments on behalf of an increasing number of loose and fragmented drug trafficking networks. Brokers are also based in key locations such as the United Arab Emirates and provide money laundering and other criminal services, which highlights the highly international nature of the global drugs trade.

Overall, the number of violent incidents linked to drugs trafficking has increased over the past few years. In Sweden and the Netherlands, for example, violent incidents have taken place during the pandemic. In 2019, Sweden registered a high number of shootings and explosions, resulting in many murders and an even greater number of attempted murders. In 2020, shootings and bombings continued to increase between January and April compared with the same period in 2019.

The use of violence (physical harm, liquidations and abductions) is common, primarily against rivals as part of debt recovery, for revenge and to maintain OCG discipline and cohesion. It is known that access to firearms is not an issue for many OCGs and that OCGs have access to weapon stocks, despite the COVID-19 measures.

Law enforcement responses

In the wake of the COVID-19 pandemic, national governments across the EU have adopted a range of restrictive measures to slow down the spread of the virus. Some of the measures taken by EU Member States have had impacts on drug supply chains. Most EU countries have imposed some degree of border restrictions for all three modes of transportation: air, land and sea. To enforce the restrictions, staff have been re-deployed in certain areas and duties have been re-focused. The increased presence of law enforcement authorities in key areas and more frequent checks have led to many small drug seizures; for example, there have been reports of seizures of drugs at COVID-19 checkpoints in France, Italy, Spain and the United Kingdom (BBC News, 2020; *La Gazzetta del Mezzogiorno*, 2020).

The COVID-19 pandemic has had an impact on law enforcement authorities across the EU. A partial shift in the operational focus to public order policing has temporarily reduced the availability of personnel to perform investigative and intelligence work on serious and organised crime groups involved in multiple crime areas. However, despite a temporary decrease in international information exchange, high-risk OCGs and their leaders continue to be targeted and investigated by EU Member States. Within a constantly changing operating environment, Europol has continued to support these investigations, particularly against those high-risk OCGs involved in large-scale drug production and trafficking, by providing operational support on a 24/7 basis.

When the COVID-19 restrictions are relaxed, it will be apparent that the crime techniques used in the pre-COVID-19 period have changed. As drug producers, traffickers and distributors overcome the difficulties presented by the pandemic, for example by inventing new *modi operandi*, using new routes or moving business online, law enforcement authorities must adapt to face the new challenges. The 'new normal' operating environment, although resulting in challenges for law enforcement authorities, will also provide opportunities to enhance investigations against serious and organised crime in the EU and beyond.

Europol noted a decrease of 30 % in the number of messages exchanged between Member States and Europol during the first weeks of March as lockdown measures were coming into effect across the EU. However, the message exchange rates have since returned to normal pre-pandemic levels. The number of messages related to drug trafficking activities also decreased. However, investigations into criminal networks involved in the drug trade continued throughout this period.

Outlook

In this report we have discussed some of the immediate drug market changes that have occurred before and during the restrictive measures imposed to prevent the spread of COVID-19. This information, although based on limited data, provides a window on the reactions of the drug market under these extraordinary circumstances. Clearly, the exercise of collecting, analysing, understanding and interpreting data has little value if it does not allow us to learn lessons for the future. Only by doing this will we be better prepared for similar events in the future.

Restrictions on movement

The restrictions placed on the movement of citizens, including 'lockdowns' in many countries, have necessitated changes to how some drug-related business takes place. As noted in this report, this includes the use of home deliveries; less reliance on cash as a form of payment; less face-to-face dealing; and the potential for more individual drug transactions to take place online — on the darknet, on social media or using encrypted communications apps.

While the restrictions will gradually be lifted, it is very likely that some of the new practices will persist, as they may be a more convenient way to conduct business. An increase in the use of digital, communication and cyber-based technologies by drug trafficking organisations is expected.

Travel restrictions

It is reasonable to expect that there will be residual restrictions on travel in place after the tightest restrictions are lifted. Air passenger transport will gradually increase but is unlikely to quickly go back to pre-COVID-19 levels. The international movements of drug traffickers and high-level members of OCGs within Europe to source and transit countries are currently limited because of the travel restrictions. Despite this, large-scale drug importations continue, presumably arranged through secure communication channels. In the post-pandemic period, there may be less reliance on face-to-face meetings at this level.

Economic recession

What will the highly likely economic recession look like? The long-term projections of negative economic consequences are likely to have an exaggerated effect on dependent drug users,

potentially resulting in higher levels of drug-related acquisitive crime; however, different communities, cities and countries are likely to see disproportionate manifestations of this. It is expected that much of the population will have less disposable income available and this may mean less money to buy drugs, especially as drugs are likely to become more expensive. This could lead users to increase their alcohol intake or seek out less expensive alternative substances, such as NPS or more damaging routes of administration, like injecting.

The longer-term effects of the COVID-19 pandemic are likely to have implications for the laundering of illicit drug proceeds; the likely economic downturn may lower barriers for engagement in corruption and other practices facilitating the drugs business. For example, cash-rich criminal organisations may take control of financially troubled legitimate businesses to further their criminal activities, either immediately or in the long term (Roberts and Barigazzi, 2020).

Drug trafficking and distribution patterns

Organised crime groups are likely to continue to adapt their transportation models and trafficking routes. The dramatic disruption to smuggling by air passengers may remain, with greater reliance placed on post and parcel services for drug distribution. Concealment methods are likely to evolve as part of drug distribution practices in future.

The disruption to shipments of drugs such as heroin and cannabis resin across Europe using road networks is expected to lead to further maritime transportation of these drugs.

There is a clear potential for online drug distribution to gain more traction and it may therefore be predicted that darknet markets, social media and secure communications channels will increase in importance.

There is some clear evidence of availability issues in some places, probably linked to difficulties in intra-EU distribution rather than importation problems. Similar to authorities learning that they need to be prepared for such scenarios in future, groups involved in drug distribution will learn from this experience that they may need to have more 'local' stocks of drugs in place to satisfy demand, especially for dependent users.

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Statement regarding the United Kingdom

The United Kingdom left the European Union on 1 February 2020. However, during the transitional period until the end of 2020, the United Kingdom continues to be part of the European single market. Therefore, information relating to the United Kingdom has been analysed and reported here, along with information from the EU Member States.



About the EMCDDA

The European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) is the central source and confirmed authority on drug-related issues in Europe. For over 25 years, it has been collecting, analysing and disseminating scientifically sound information on drugs and drug addiction and their consequences, providing its audiences with an evidence-based picture of the drug phenomenon at European level. Based in Lisbon, the EMCDDA is one of the decentralised agencies of the European Union.

www.emcdda.europa.eu

About Europol

Europol is the European Union Agency for Law Enforcement Cooperation, whose mission is to support its Member States. Europol employs almost 1 000 staff at its headquarters in The Hague. They provide a unique and evolving set of operational products and services to EU law enforcement authorities in their fight against serious and organised crime, cybercrime and terrorism. Europol is at the heart of the EU's security architecture and has developed into the hub for the exchange of criminal intelligence in Europe. Europol's focus is to look ahead for more opportunities to streamline law enforcement cooperation in order to create a safer Europe for the benefit of all EU citizens.

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